



Automobile Industry In Kentucky



The Automobile Industry in Kentucky

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Executive Summary

The Automobile Industry in Kentucky

Auto manufacturers, along with their suppliers and dealers provide a major driving force in the U.S. economy, and Kentucky has capitalized on this industry. In Kentucky, approximately 2.98 percent of the state's employment is in either the automobile industry or in a job dependent on the auto industry. What has sold Kentucky to the automobile industry has been its:

- ◆ Quality Workforce
- ◆ Geography
- ◆ Understanding of Business Needs
- ◆ Low Cost of Power

Pertinent facts on the contribution of the automobile industry in Kentucky:

- ◆ In 2003, Kentucky's automobile industry represented 5.1% of the state's Gross State Product.
- ◆ Kentucky's automotive industry gross state product for 2003 was nearly \$6.5 billion.
- ◆ According to a University of Michigan study entitled, *Contribution of the Automotive Industry to the U.S. Economy*, Kentucky has the nation's 3rd highest level of auto industry related employment as a percent of total state employment in the United States.

Kentucky Auto Assembly Plants

Following are brief backgrounds of automobile manufacturing facilities in Kentucky:

Ford first came to Kentucky in 1913, when Henry Ford began a "factory" at the Summers-Herman Dealership in Louisville. In 1925, Henry Ford created what was called "the first modern assembly plant" in Louisville. The plant turned out Model A's and other Ford trucks and cars. During World War II, the plant geared up to produce military equipment.



In 1955, Ford began operations at the Louisville Assembly Plant, and in 1969, began operations at the eastern Jefferson County Truck Plant. The Louisville Assembly Plant employs 3,454. In 1997, an expansion at the Louisville operations added 1,000 jobs and 130,000 square feet to the Kentucky Truck Plant. Total employment at the truck plant now stands at 6,600. The expanded facility, at 4.6 million square feet, is the second-largest Ford assembly plant in North America.



On June 1, 1981, General Motors moved production of the Corvette from St. Louis to Bowling Green, which remains today as the exclusive home of the Corvette. The 1,200 employees in 2004 built over 35,000 vehicles at the 1 million square foot plant. The new Cadillac XLR has been produced in Bowling Green since the end of 2002.



Georgetown, which began production in 1988, is Toyota's largest production plant in North America. With two vehicle production lines and a powertrain engine and axle facility, more than 7,400 team members build about 500,000 vehicles and nearly 400,000 engines each year. In addition, Toyota's North American Headquarters is located in Erlanger, Kentucky employing 650. Toyota's North American Parts Logistics Division is located in Hebron, KY employing 350.

Kentucky Automobile Production Numbers

Motor Vehicle Production and Facilities

In 2004 1,162,681 cars and light trucks were assembled in Kentucky. GM has a plant in Bowling Green that produces the Corvette and the new Cadillac XLR. Ford's Louisville Plant produces the Ford Explorer and Mercury Mountaineer SUV models and the Sport Trac. The Ford Kentucky Truck Plant manufactures the Ford Excursion

and F-Series Super Duty models. Toyota has a plant in Georgetown that manufactures the Toyota Camry, Avalon and Solara. In addition, Erlanger is home to Toyota's North American Manufacturing Headquarters.

Source: *The Alliance of Automobile Manufacturers*

2004 KY Automobile Production Comparison

Table 1 Rank by 2004 Total US Light Vehicle Production	
State	Total Light Vehicle Production
Michigan	2,598,421
Ohio	1,740,631
Missouri	1,226,300
Kentucky	1,162,681
Indiana	769,744
Tennessee	698,517
Illinois	396,826
Georgia	395,690
California	380,678
Mississippi	267,354

Data source: *Automotive News 2005 Market Data Book*

- The best-selling car in the U.S. for 2004, the Toyota Camry, is manufactured in Georgetown, Kentucky. The Camry has been the best selling car in the US seven out of the last eight years.
- The number one selling truck in 2004, the Ford F-Series pickup, is manufactured in Louisville, Kentucky. The best-selling SUV in the U.S., the Ford Explorer, is manufactured there as well.
- The Kentucky-produced Chevrolet Corvette is the top-selling premium sports car. Year 2004 sales were 35,276.
- The Toyota Avalon, the 4th best selling car in its class in 2003, is also manufactured in Georgetown.

Table 2 Rank by 2004 US Car Production	
State	Car Production
Michigan	1,259,177
Ohio	797,009
Kentucky	504,329
Tennessee	417,781
Illinois	346,130
California	237,397
Georgia	235,542
Kansas	227,064
Indiana	105,550
Mississippi	59,892

Data source: *Automotive News 2005 Market Data Book*

Table 3 Rank by 2004 US Truck Production	
State	Truck Production
Michigan	1,298,015
Missouri	1,255,738
Ohio	956,959
Indiana	691,357
Kentucky	624,341
Tennessee	257,793
Alabama	231,297
Virginia	204,923
Wisconsin	201,916
Louisiana	158,837

In 2004 KY Ranks:

4th in total light vehicle production in the US

And

3rd in production of cars

And

5th in production of light trucks

9.8 percent of all cars and trucks produced in the U.S. are made in Kentucky.

Auto Manufacturing Impact on the Kentucky Economy

The automobile manufacturing industry has a very strong presence in Kentucky, and it has grown significantly over the last several years. In 2004, the automobile industry employed nearly 90,000 in Kentucky, with 19,500 in the motor vehicle manufacturing industry. In Kentucky, employment in the motor vehicle manufacturing industry has grown by more than 35% between 1995 and 2000, compared to 14% for all industries and 2.5% for manufacturing. Kentucky's employment growth in the motor vehicle manufacturing industry between 1995 and 2000 ranks second among the top 10 automobile producing states.

The gross state product (GSP) for the Motor Vehicles industry in 2002 was \$6.354 billion, and it experienced growth rates of 225% and 71% for the periods 1991-2001 and 1996-2001, respectively. The growth rate of 71% from 1996-2001 ranks first among the top automobile producing states. The 2002 GSP per capita of \$1,400 for the Motor Vehicles industry ranks third among the top states in 2002. The *Annual Survey of Manufacturers*, January 2003 issue, lists the value of shipments for the auto manufacturing industry at over \$30 billion, which ranks third among the top automobile producing states. The value of shipments grew by a rate of 26% between 1995 and 1999.

Impact of Automobile Manufacturing Industry on Kentucky

Table 4

	All Industries	Manufacturing	Automobile Industry
Employees (2000)	1,816,900	307,200	53,451
Employment Growth (1995 – 2000)	11.1%	2.5%	37.7%
Total Annual Wages	\$52,136,852,000	\$11,138,577,000	\$2,624,724,235
GSP (2002 Current Dollars)	\$122,282,000,000	\$25,471,000,000	\$6,354,000,000
Real GSP Growth (1991-2001)	41.38%	45.95%	225.14%
GSP per Capita (2002)	\$29,899	\$6,228	\$1,554

Note: Motor Vehicles refer only to automobile manufacturing industry for all of the categories, except those concerning gross state product. In these cases, it refers to the entire motor vehicle industry including parts and accessories. Sources: *Employment and Wages Annual Averages, 2001*, US Department of Labor, Bureau of Labor Statistics, December 2002; Kentucky Workforce Development Cabinet, Department of Employment Services; Bureau of Economic Analysis, <http://www.bea.doc.gov/bea/regional/gsp/>, May 2003. In this table, the Automobile Industry is defined by NAICS 3361, 3362 and 3363.

The automobile manufacturing industry has impacted the economy and people of the Commonwealth in a very positive manner. The automobile manufacturing industry provides thousands of well-paying jobs to the people of Kentucky. In 2001, the average weekly wage for this industry was \$1,333 compared to \$732 for manufacturing industries and \$576 for all industries.

Employers in the auto industry paid over \$2.6 billion in wages to employees in 2002, and wages paid totaled over \$1.4 billion in the motor vehicle manufacturing segment of the industry. The motor vehicles industry component accounted for 5.2 percent of Kentucky's total GSP in 2002.

Value Added by Auto Manufacturers in the Top Automobile Producing States

Table 5

State	Value Added by Manufacture	Value of Shipments	Value Added per Production Worker	Value Added per Dollar Production Wage
Kentucky	\$10,632,725,000	\$30,052,579,000	\$676,726	\$9.03
California	\$772,644,000	\$3,107,693,000	\$127,499	\$2.52
Georgia	\$3,295,814,000	11,030,546,000	\$453,781	\$7.50
Illinois	\$2,633,559,000	\$9,394,892,000	\$315,358	\$4.87
Indiana	\$2,522,187	\$9,232,323	\$375,157	\$6.30
Michigan	\$19,340,199,000	\$65,692,124,000	\$402,091	\$6.26
Missouri	D	D	D	D
Ohio	\$12,862,693,000	\$38,003,560,000	\$418,830	\$7.42
Tennessee	\$2,705,651	\$9,558,914,000	\$214,819	\$3.99
Wisconsin	D	D	D	D

Note: D: Data not disclosed by Census Bureau. Missouri and New Jersey are both among the top 10 states in automobile production, but the value-added data for these states is withheld due to confidentiality concerns. Sources: *Geographic Area Statistics: Annual Survey of Manufacturers*, U.S. Census Bureau, Issued January 2003.

Business Cost Comparison

Kentucky continues to be the state with the lowest overall cost of doing business in the eastern United States according to economists with Economy.com (Regional Financial Associates). The December 2003 edition of the *North American Business Cost Review*, 10th edition, measures the cost of doing business within a state for unit labor cost, tax burden, and energy cost.

Kentucky has been determined to have the lowest overall cost of doing business when compared to the top ten auto producing states and with states that are generally considered to be economic competitors with Kentucky. The index utilized to measure the overall cost of doing business within a state ranks Kentucky as the state with the 3rd lowest cost nationally with a state index of 83.8. The national average index is 100.0.

Cost of Doing Business: 2003
Top Ten (10) Auto Producing States: 2003
Total United States Light Vehicle Production (Cars and Trucks)

Table 6								
Top Auto States	Overall Cost of Doing Business		Unit Labor Cost		Energy Cost		State & Local Taxes	
	Business Index	Rank	Cost Index	Rank	Energy Index	Rank	Tax Index	Rank
United States	100.0		100.0		100.0		100.0	
Kentucky	85.0	4	87.00	4	66.5	1	97.6	26
California	119.5	50	112.50	47	162.5	50	107.5	42
Georgia	96.2	17	100.00	23	81.4	14	90.7	11
Illinois	102.3	30	104.00	30	98.1	36	96.1	23
Indiana	97.8	22	102.30	27	76.8	10	95.7	21
Michigan	108.3	42	112.40	45	92.4	30	101.1	36
Mississippi	102.7	31	106.00	36	89.0	28	98.0	28
Missouri	95.1	15	99.60	22	76.6	9	88.7	7
Ohio	101.7	28	102.30	28	94.7	32	107.3	41
Tennessee	94.2	14	98.40	20	83.2	18	78.9	2

Note: A ranking of one (1) represents the lowest cost. United States Average Cost Index = 100.0

Source: North American Business Cost Review (2003), 11th Edition, Prepared by Economy.com, Inc.--Updated December 2003 and the Automobile News Market Data Report, 2005.

Labor Cost Comparison

The labor costs for Kentucky employers compare very favorably to those in the other top auto production states, especially when you consider the productivity of the Kentucky workforce. The average weekly wages are below the U.S. average for all of private industry, manufacturing, and the automobile manufacturing industry. With respect to manufacturing, only Georgia and Tennessee among the top 10 auto producing states have lower average weekly wages than Kentucky. For private industry the average weekly wages in Kentucky are the lowest among these states. The Cost of Doing Business Table (6) shows that Kentucky ranks first among the top 10 auto producing states with respect to the lowest unit labor cost. A recent study on the cost of workers compensation finds that the cost of providing workers compensation insurance is below the national average and second lowest among the top automobile producing states. (Note: Ohio data is not available for workers compensation cost index because it is one of

five states that provided workers compensation insurance exclusively through a state fund.)

As shown in the Labor Cost table (7), Kentucky ranks 4th lowest among the top auto producing states with respect to the average weekly wages for the motor vehicle manufacturing industry. **However, as shown by table (5), the auto-manufacturing workforce in Kentucky is the most productive among the top auto producing states.** For the automobile manufacturing industry, Kentucky ranked first among the top automobile producing states with respect to both value-added per production worker and value-added per production wage. The value added per production worker in Kentucky was almost 50 percent higher than in Georgia, which ranked second. Compared to the top automobile producing states with the lowest wages, Kentucky's value added per production wage was 21 and 256 percent higher than Indiana and California's value added per production wage, respectively.

Labor Cost Comparison among Top Automobile Producing States

Table 7				
Average Weekly Wages				
State	All Private Industry	Manufacturing	Motor Vehicle Manufacturing	State Average Costs of Workers Compensation Per \$100 of Payroll
United States	\$721	\$883	\$1,387	\$3.87
California	\$805	\$1,033	\$1,289	\$12.45
Georgia	\$709	\$761	\$1,505	\$3.26
Illinois	\$780	\$890	\$1,107	\$3.54
Indiana	\$642	\$874	\$1,230	\$1.82
Kentucky	\$609	\$796	\$1,367	\$3.93
Michigan	\$759	\$1,067	\$1,574	\$4.14
Missouri	\$653	\$796	\$1,456	\$4.69
Ohio	\$666	\$883	\$1,400	ND
Tennessee	\$644	\$772	ND	\$4.14
Mississippi	\$522	\$615	ND	\$3.08

Sources: *Employment and Wages Annual Averages, 2001*, US Department of Labor, Bureau of Labor Statistics, December 2002; Quarterly Census of Employment and Wages, BLS, 2003; Workers Compensation State Rankings Manufacturing Industry Costs and Statutory Benefit Provisions, Actuarial and Technical Solutions, Inc., 2004 Edition. In this table, Motor Vehicle Manufacturing is defined by NAICS 3361.

ND Data do not meet BLS or State agency disclosure standards.

Tax Costs

Kentucky continues to be ranked as the state with the *lowest* overall cost of doing business among the top automotive producing states according to Economy.com. The March 2005 edition of the *North American Business Cost Review*, 11th edition, measures the cost of doing business within a state for unit labor cost, tax burden, and energy cost.

Among the nation's top 10 states in light vehicle production, Kentucky's overall cost of business is lowest. The index utilized to measure the overall cost of doing business within a state ranks Kentucky as the state with the 4th lowest cost nationally with a state index of 85.0.

Among the top 10 automotive producing states, Kentucky ranks lowest and 3rd in per capita state and local property tax and state and local tax burdens, respectively. Nationally, Kentucky ranks 7th lowest in per capita state and local government property tax burden, and 15th lowest in per capita state and government tax burden.

Competitor State Tax Burden: 2002

Kentucky vs. Competitor States	Per Capita State and Local Government Property Tax Revenue		Per Capita State and Local Government Tax Revenue	
	Per Capita	National Rank	Per Capita	National Rank
United States	969		3,143	
California	864	22	3,442	43
Georgia	778	18	2,817	24
Illinois	1,261	41	3,303	38
Indiana	970	33	2,758	23
Kentucky	483	7	2,636	15
Michigan	975	34	3,051	30
Mississippi	574	11	2,275	4
Missouri	683	15	2,663	17
Ohio	933	29	3,169	34
Tennessee	596	12	2,240	3

Source: Morgan Quitno Press using data from U.S. Bureau of the Census, Governments Division.

Note: A ranking of 1 represents the best condition = lowest business

Tax Modernization

In March 2005, Governor Ernie Fletcher signed House Bill 272 legislation to reform Kentucky's outdated tax system. The legislation began the first comprehensive overhaul in more than half a century to a revenue system largely based on a 19th century economy. The reform seeks to accomplish several objectives including improving the tax climate for economic development, including eliminating the corporate license and intangible property taxes.

"Few things are talked about more and accomplished less than tax reform. I applaud the Governor and the General Assembly for bringing together a comprehensive tax plan. It's good for business and it's good for Kentucky."

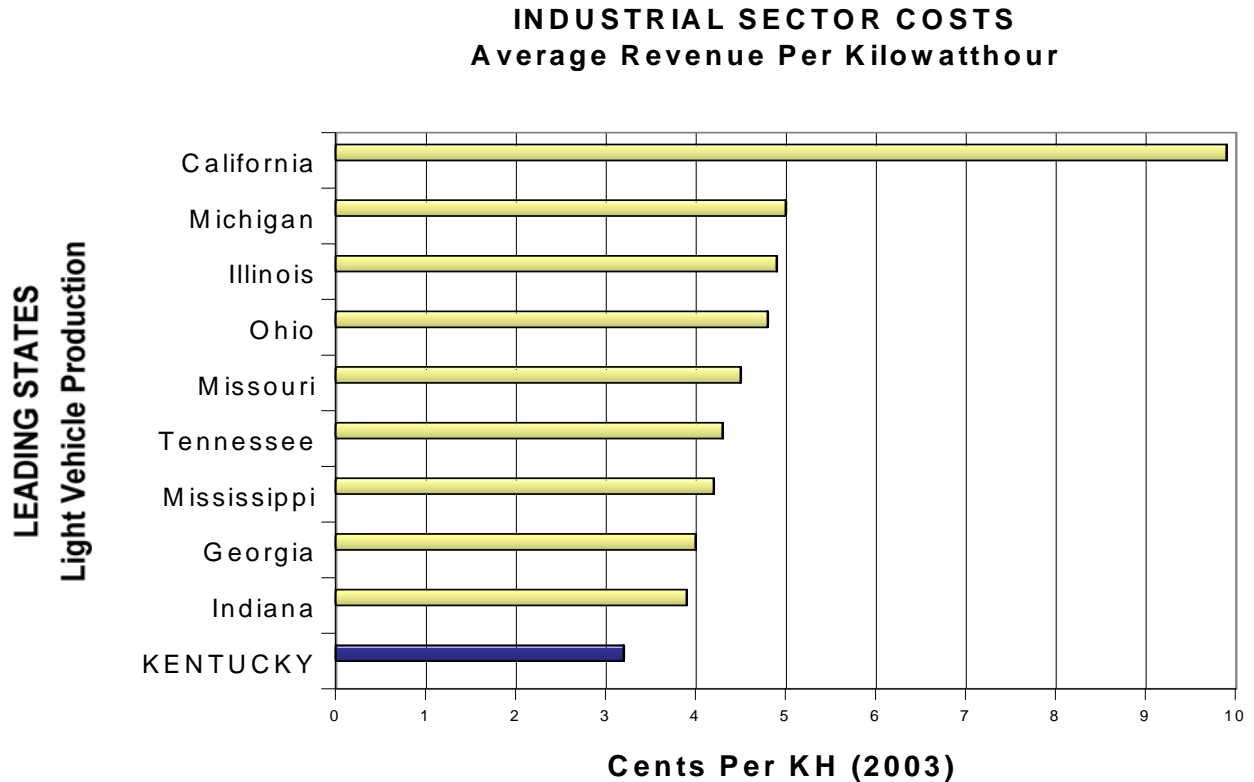
Dr. William Fox, Tax Expert
University of Tennessee

Points of Interest to the Business Community from Tax Law Changes

- Eliminates the corporation license tax.
- Sets individual income tax rate at 5.8% for income between \$8,000 and \$75,000.
- Lowers maximum corporate income tax rate to 6% beginning in 2007.
- Establishes alternative minimum tax of \$0.095 per \$100 gross receipts or \$0.75 per \$100 of Kentucky gross profits, whichever is less. There is a \$175 minimum regardless of method used.
- Maintains tax credit incentives against new corporation taxation plan.
- Expands definition of corporation to include LLCs, LLPs, LPs, REITs, S-corps and other legal entities.
- Eliminates intangible property tax on all but financial institutions and domestic life insurance companies, including accounts receivable.

Utility Costs

A globally competitive business environment compels companies to examine the long-term costs of production and distribution, and to focus on regional differences in the net costs of doing business. Among the most significant factors having a direct influence on bottom-line costs is the annual capital that must be committed to utility consumption. Kentucky occupies *the* premier position in the provision of low cost electric power among the top vehicle producing states – enjoying an 18% to 67% cost savings over these competitors.



Kentucky has provided *the* least expensive electric power east of the Mississippi River – and among the top vehicle producing states – *throughout the entire decade of the 90s*. Moreover, in 2003, data from the U.S. Department of Energy, Energy Information Administration, show that Kentucky lays claim to the position of lowest electric cost state - *among all fifty states* - for the provision of industrial power.

Kentucky's electric power cost, in the industrial sector, ranks the lowest in the nation.

Approximately ninety-six percent of Kentucky's electric power is produced by coal-fired power plants, with the balance generated by hydroelectric dams, fuel oil, and natural gas. Kentucky's large coal reserves ensure abundant supplies of electric power for the foreseeable future. In turn, a large number of utility providers, and oversight by the Kentucky Public Service Commission (PSC) (<http://www.psc.state.ky.us>), continue to ensure competitive rates for industrial users. These power distributors are allowed to negotiate lower economic incentive rate contracts with large industrial and commercial customers, subject to approval by the Kentucky PSC. Significant discount rates can be granted for up to five years for both new and expanding operations.

Kentucky's Central Location in Relation to Auto Alley

Transportation

A freight distribution network that is efficient, safe, and technologically competitive makes Kentucky an ideal location for businesses needing just-in-time delivery and reliable access to markets and suppliers. Geographically located within a day or two highway travel of two-third's of the nation's buying power, Kentucky maintains a continuing six year highway construction and improvement plan that ensures necessary structured growth and regular maintenance.

In an analysis of the comparative performance of state highway systems conducted annually at the University of North Carolina-Charlotte, only Kentucky and Georgia achieve a top ten rating among the ten leading light vehicle producing states for the year 2000. In fact, since the study began in 1984, Kentucky's ranking has never fallen lower than 22nd among the fifty states (Hartgen, David T., Ph.D., P.E., *TEA-21 at Midpoint: Comparative Performance of State Highway Systems, 1984-2000*, University of North Carolina at Charlotte, February 6, 2002).

Further evidence of the superior quality of Kentucky's transportation system lies in the high rankings awarded to it by *Expansion Management* and *Transportation & Distribution* magazines in their joint analysis of state and metropolitan area logistics factors (*Expansion Management, Logistics Quotient*, September 2001). Kentucky achieved the following rankings among the fifty states:

- Rail Freight Utilization – 4th best
- Logistics (Overall Ranking) – 6th highest
- Lowest State Fuel Taxes and Fees – 5th best

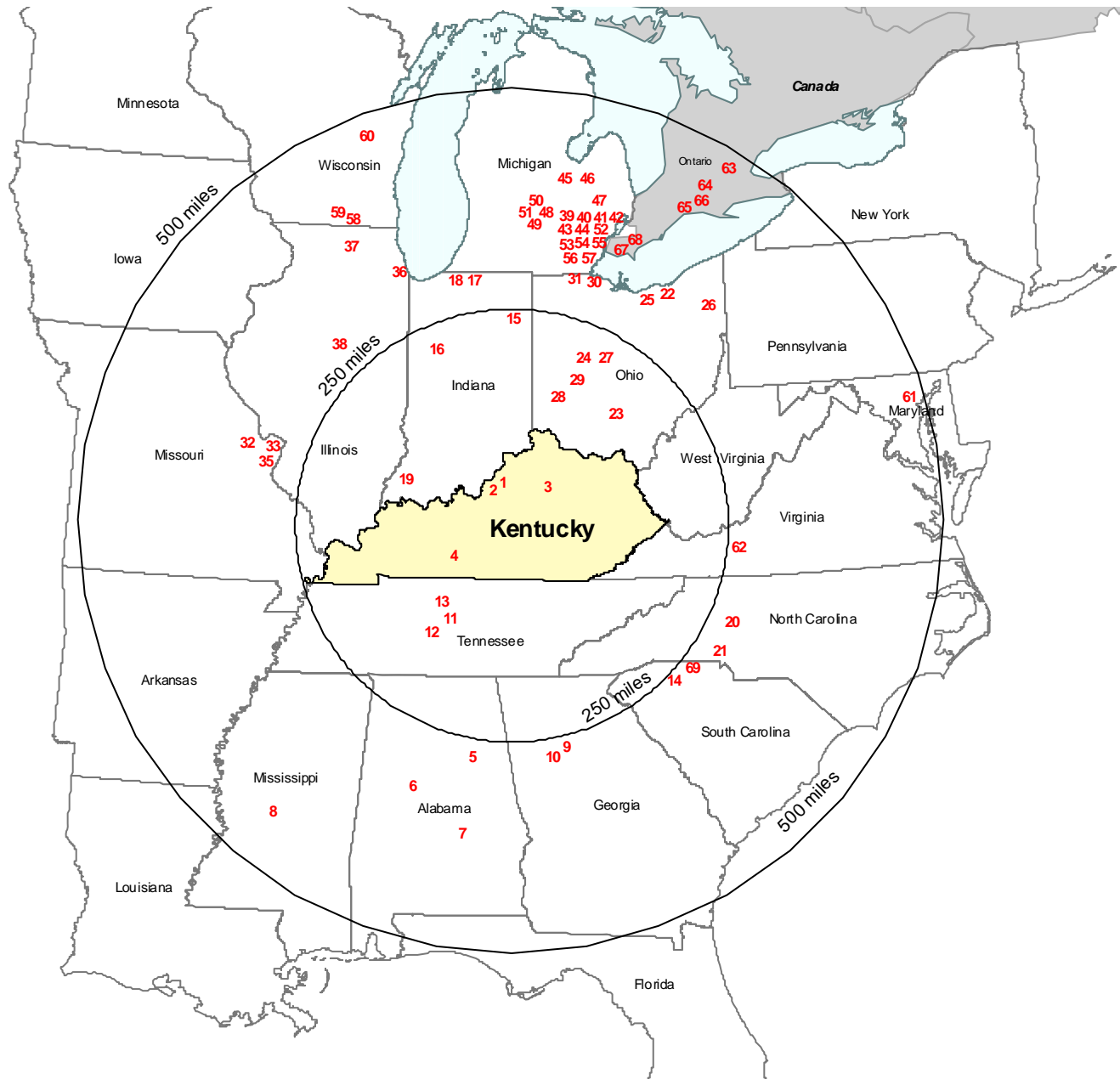
Kentucky's railroads – the CSX, Norfolk Southern, and Canadian National Railroads - ensure direct service from Kentucky to the major rail centers of the Great Lakes, Gulf of Mexico, and Atlantic Seaboard.

Accessibility to modern major airport services, and safe, efficient air travel for business purposes, are well addressed by Kentucky's statewide system of commercial and general aviation airports. Non-stop international flights depart from the Cincinnati/Northern Kentucky International Airport and from the Louisville International Airport in Louisville/Jefferson County.

The Cincinnati/Northern Kentucky International Airport (CVG) is America's top-rated airport, according to the annual survey by Skytrax Research. This award marks the 16th time in 10 years CVG has been recognized for service excellence. A Federal Aviation Administration (FAA) report named the airport as the second fastest growing U.S. hub airport, based on total passenger boardings or enplanements. Cincinnati serves more than 22 million passengers a year, ranking 20th in the United States. CVG ranks 8th in the world for total flights, 7th in the United States, and 5th in the United States for total cities served non-stop. Eleven air carriers provide 600 daily departures with 180 daily non-stop flights to 130 major U.S. cities. CVG is an international gateway with daily non-stop international flights to Amsterdam, London, Paris, Frankfurt, Rome, Toronto, Montreal, Bahamas, Cancun and Cayman Islands. Daily direct flights are offered to Milan, Munich, Stuttgart, Tokyo, and Nagoya, Japan.

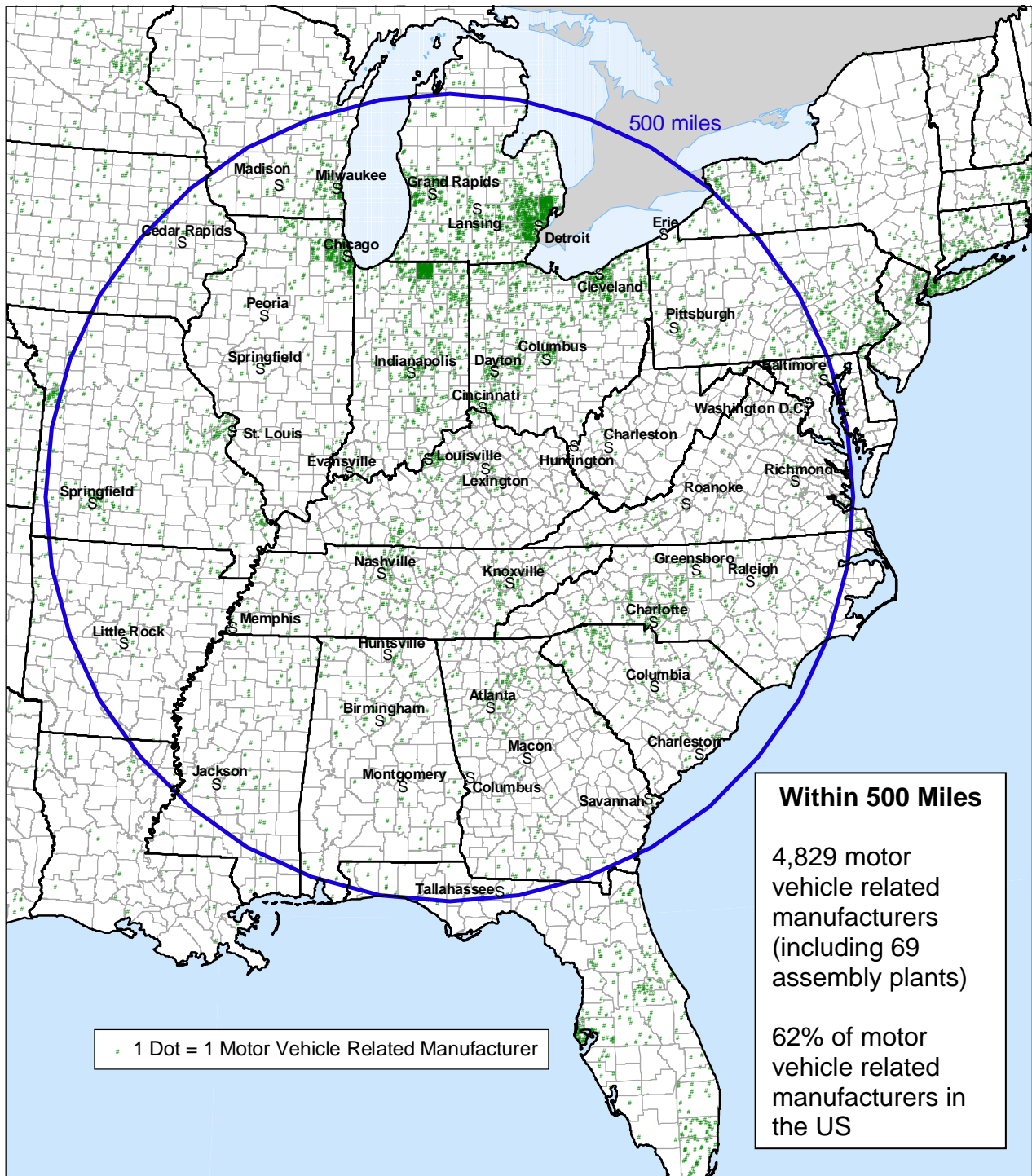
The Louisville International Airport is home to the international air-sorting hub of United Parcel Service. UPS Worldport, the world's most sophisticated shipping facility, has helped make the Louisville International Airport the seventh largest cargo airport in the nation, and the twelfth largest cargo airport in the world.

Automobile and Truck Assembly Plants within 500 Miles of Central Kentucky



1 Ford	15 General Motors	29 Navistar International Corp	43 Ford	57 Ford
2 Ford	16 Subaru	30 DaimlerChrysler	44 AutoAlliance	58 General Motors
3 Toyota	17 AM General	31 DaimlerChrysler	45 General Motors	59 General Motors
4 General Motors	18 AM General	32 General Motors	46 General Motors	60 Oshkosh Truck Corp
5 Honda	19 Toyota	33 Ford	47 General Motors	61 General Motors
6 DaimlerChrysler	20 Freightliner	34 DaimlerChrysler	48 General Motors	62 Volvo
7 Hyundai	21 Freightliner	35 DaimlerChrysler	49 General Motors	63 Toyota
8 Nissan	22 Ford	36 Ford	50 General Motors	64 CAMI
9 General Motors	23 PACCAR/Kenworth Truck Co.	37 DaimlerChrysler	51 General Motors	65 Ford
10 Ford	24 Honda	38 Mitsubishi	52 DaimlerChrysler	66 Freightliner
11 Nissan	25 Ford	39 Ford	53 DaimlerChrysler	67 DaimlerChrysler
12 General Motors	26 General Motors	40 DaimlerChrysler	54 Ford	68 DaimlerChrysler
13 PACCAR/Peterbilt	27 Honda	41 DaimlerChrysler	55 Ford	69 Freightliner
14 BMW	28 General Motors	42 General Motors	56 General Motors	

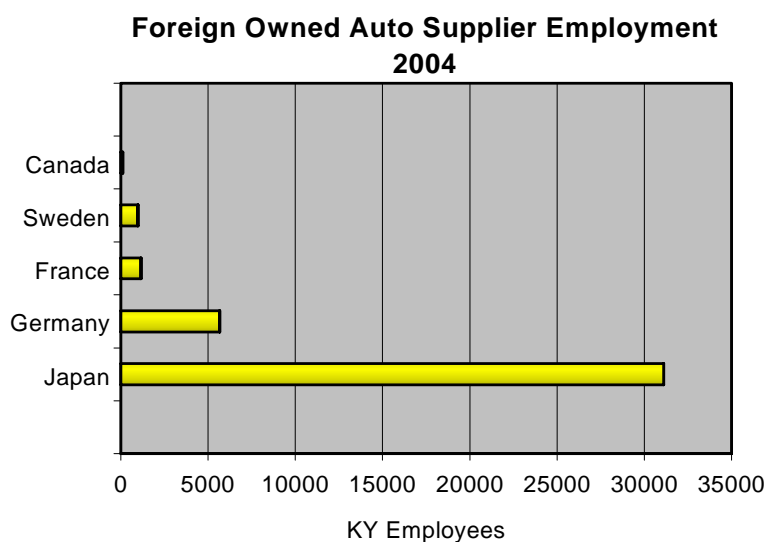
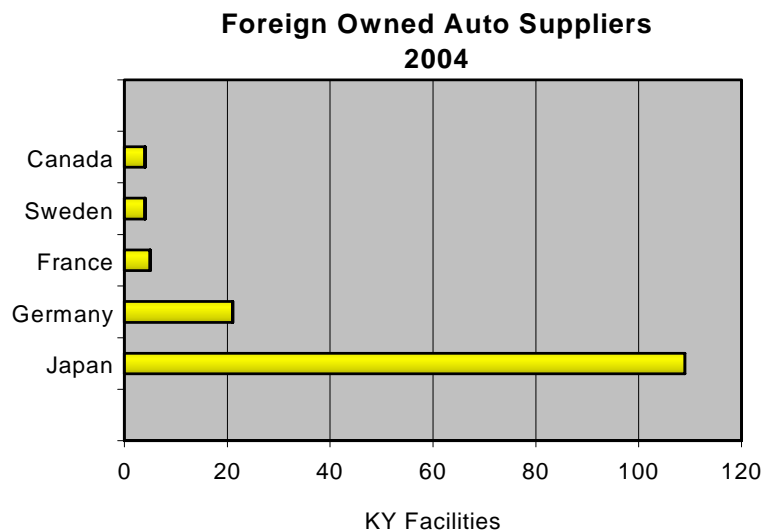
Motor Vehicle Related Manufacturers within 500 Miles of Central Kentucky



Map Date: 6/27/2005 Source: U.S. Census Bureau, County Business Patterns 2001-2002, issued December 2004

Snapshot of Kentucky's Motor Vehicle Related Suppliers

Kentucky has 496 motor vehicle related suppliers employing over 90,000, which includes the 19,500 employees at the 4 Kentucky automotive assembly plants. 135 facilities are foreign-owned.

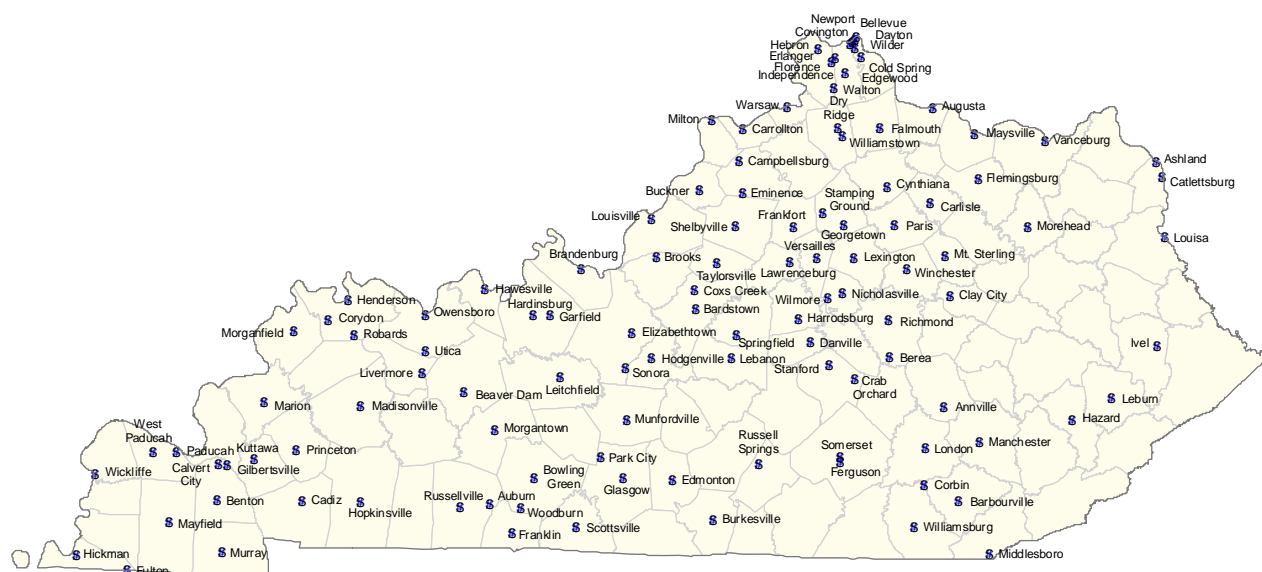


Concentration of Supplier NAICS Codes

Kentucky's auto-related facilities supply a wide-variety of products for the automotive industry. The top products produced are represented by their respective NAICS Codes:

NAICS	Description	# of Firms	Percent of Firms
336399	All Other Motor Vehicle Parts Manufacturing	99	20%
326199	All Other Plastics Product Manufacturing	61	12%
333514	Special Die and Tool, Die Set, Jig, and Fixture Manufacturing	37	8%
332116	Metal Stamping	28	6%
332710	Machine Shops	21	4%

Kentucky's Motor Vehicle Related Suppliers (491 facilities, 89,747 employees)



This following list details motor vehicle related facilities as of November 2005. Click on links for the latest listing of [MVR Facilities](#) and corresponding [MVR Map](#).

Place	Facility	Product Description	Employment
Annnville	JC Tec Industries	Injection molded plastic parts, assemblies, and wire & harness boards, military tent stakes and tent lanyards, portable furniture	22
Ashland	AK Steel Corp	Coke making	250
	AK Steel Corp	Steel slabs	900
	Kentucky Electric Steel LLC	Steel flat bars	136
Auburn	Caldwell Industries Inc	Nonmetallic gaskets and extruded plastic	51
Augusta	Auto Fastener Group	Repackaging of automotive after-market products	20
Barbourville	Strong's Machinery & Sales Inc	Screw machine products	11
Bardstown	FET Engineering Inc	Electroform nickel, slush/rotational molding, RTM, vacuum forming & tools & automotive interior trim	27
	HEC Manufacturing Inc	Custom structural steel fabricating, steel returnable containers (racks or pallets)	30
	Hokumo America Corporation	Plastic injection molding, assembly of automotive parts	10
	Intertec Systems LLC	Automotive instrument panels and consoles	195
	Jideco of Bardstown Inc	Windshield wiper, power window & cooling fan motors; cruise control devices	370
	Johnan America Inc	Automotive door window regulators and sunroof units	37
	Tower Automotive Inc	Metal & automotive stampings	564
	Trim Masters Inc	Automotive door trim	350
Beaver Dam	Daicel Safety Systems America LLC	Inflators for automotive airbags	175

	Ritatsu Manufacturing Inc	Stamping and welding of automotive parts	40
Bellevue	Liberty Plastics Molding Corp Inc	Plastic injection molds, molding & prototypes	12
	Thompson Enamel Inc	Powdered glass colors (enamels) & enameling accessories, small kilns, trivets, spatulas, sifters, scribes, copper bowls, ashtrays, plates-stampings, and flat copper shapes.	23
Benton	Checker Products Inc	Fiberglass truck bed covers	12
Berea	Kentucky Steel Center Inc	Steel service center: coil slitting and steel sheets	70
	KI-USA Corp	Machined, metal stamped & cationic painted automotive parts & components, arc & resistance welding	308
	Panasonic Motor Company	Small electric motors for vacuum cleaners, antilock brake system and spas	70
	PPG Industries Inc	Replacement windshields	156
	Tokico (USA) Inc	Automobile shock absorbers, struts, brake systems & air compressors	860
Bowling Green	ASC Incorporated	Automobile convertible hard tops, military boxes, and automobile hoods	100
	Bando USA Inc	Automotive power transmission & industrial V-belts	160
	Bowling Green Metalforming LLC	Automotive parts	730
	C G S Machine & Tool Inc	Specialty machinery, tool & die, spare parts, production runs	29
	CTS Car Top Systems NA - Bowling Green LLC	Convertible roof tops	50
	General Motors Corp	Automobiles - Corvette, Cadillac XLR	1200
	Hennessy Industries Inc	Lead and steel wheel weights	65
	Holley Performance Products	Automotive, marine parts & accessories: carburetors, fuel injection & transmission modulators	340
	Kentucky Micro-Finishing Inc	Metal finishing & zinc, nickel, mechanical, galvanizing & phosphate plating; sorting, inspection, packaging, warehousing	5
	Kiriu USA Co Ltd	Automotive brake rotors and drums	100
	Kobe Steel Ltd	Aluminum forging plant	78
	Lord Corp	Bonded rubber parts—shock, noise, & vibration control parts	148
	NHK Associated Spring Suspension Components Inc.	Automotive coil suspension springs, trunk lid torsion bars, stabilizer links	217
	Nyloncraft Inc	Plastic automotive parts; custom plastic injection molding	95
	Quick Fuel Technology Inc	Carburetors and carburetor component parts	24

	S-R Of Kentucky Inc	Chroming plastic interior and exterior trims and moldings	375
	Stoody Co	Fabricated welding rods & electrode	96
	Sumitomo Electric Wiring Systems	Administrative Headquarters	84
	Trace Die Cast Inc	Aluminum die castings & secondary specialty machining	450
	TWN Fastener Inc	Automotive fasteners; industrial fasteners: metric, wood & sheet metal screws	110
	Waltex SKY LLC	Design, manufacture automatic welding machines, automated industrial machines, and robots for the automotive industry	3
Brandenburg	Arch Chemicals Inc	Industrial organic chemicals and chemical mfg	215
Brooks	Kentucky Clutch	Clutch rebuilding	3
	Prestige Plastics Tech Inc	Plastic injection molding service, contract manufacturing & automobile aftermarket products, complete tooling facility & mfg.	31
Buckner	Aggressive Tool & Die Inc	Tool & die, molds	7
Burkesville	Electric Mills KY	Electrical wire & plastic injection molded components	56
	Rocore Thermal Systems	Heaters, oil coolers, truck heaters & heat transfer products	80
Cadiz	American National Rubber	Rubber automotive seals & gaskets	160
	Ethridge Plastics Inc	Injection molded plastic automotive	20
	Johnson Controls Inc	Automobile & truck seat frames	737
	Southeast Tube Inc	Tube fabricating & bending	15
Calvert City	Arkema	Refrigerants & plastics, polymers, monomers	265
	ICT Inc	Automotive catalysts	43
Campbellsburg	Arvin Sango Inc	Automotive exhaust systems	85
Campbellsville	J & K Tool	Machine shop: general machining, tool & die	8
	Murakami Manufacturing USA	Motor vehicle parts & accessories, exterior mirrors	150
Carlisle	Lee-Lynn Machining Inc	Machine shop: CNC, prototype & development machining; drilling, tapping	34
Carrollton	Arvin Meritor	Disc brakes, drums & steering mechanisms, brake components for medium and heavy trucks and trailers	300
	Arvin Meritor Braking Systems	Cast heavy truck hubs & wheels	95
	Parthenon Metal Works	Steel tubing	59
Catlettsburg	Special Metals Corp	Nickel alloys	136
Clay City	Rogers Tool & Manufacturing	Sheet metal fabricating, tools, dies & fixtures	7
Cold Spring	Auto Vehicle Parts Co	Distributor of automobile fasteners, industrial fasteners, rubber molding & weather strips	60
Corbin	CTA Acoustics Inc	Organic fiber padding, industrial automotive insulation & acoustical materials	250
	TCO Inc	Motor vehicle headlights	200

Corydon	Quality Tooling Inc	Tools, steel dies, jigs & plastic injection molds	31
Covington	OEM Electric Inc	Industrial starters & alternators rebuilding	18
Coxs Creek	Synergy Tool & Gauge LLC	Tool & die: checking fixtures	27
Crab Orchard	ERJ Manufacturing Inc	Metal stamping, welding and assembly services	9
Cynthiana	Clean Earth KY LLC	Machine shop: valves, general & CNC machining; truck body fabrication	130
	TI Group Automotive Systems	Automotive refrigeration coil & steel tubing	147
Danville	Dana Corporation	Diesel & gas engine gaskets	308
Dayton	Radac Corp	Radiator cores distributor and headquarters	80
Dry Ridge	Dana Corporation	Assemble light truck axles	238
Edgewood	Summit Fire Apparatus Inc	Aluminum & steel fabricating; welding & fire truck bodies	22
Edmonton	Sumitomo Electric Wiring Systems	ECU and fuse boxes	540
Elizabethtown	AGC Automotive Americas	Automobile glass	603
	Altec Industries Inc	Aerial unit trucks for telecommunications and utility companies, telescope aerial devices	164
	AMBRAKE Manufacturing LTD	Automotive disc & drum brakes	1134
	Dana Corporation	Pick up truck/SUV frames	1036
	Enprotech Mechanical Services	Stamping press repair	34
	Summit Polymers Inc	Injection molded thermoplastics and auto interior components	340
	Superior Coatings LLC	Electroplating & dip spin coatings service	70
Eminence	Steel Technologies Inc	Steel service center: steel rolling, annealing & slitting/ blanking	143
Erlanger	Dana Corporation	Divisional headquarters	32
	Obara Corp	Robotic welding guns & welding cable	80
	Parkway Products	Plastic, composite components, thixomold—auto parts, electronic parts.	100
	Steinkamp Molding LP	Industrial molds and tools, plastic injection molds, plastic blow molds, foam molds. Prototypes, parts, jigs, fixtures, precision high speed CNC machining.	16
	Toyota Motor Manufacturing North America Inc	Corporate headquarters	800
Falmouth	Orient Engine	Automotive engine remanufacturing	38
Ferguson	Mid-State Auto Parts Rebuilders	Rebuilt alternators & starters	31
Flemingsburg	Tinnerman Palnet Engineering Products Inc	Galvanized & cold rolled steel automotive & metal roll form stamping for automotive sub assemblies, welding components.	76
	Toyo Seat USA Corp	Automotive hardware & seating components, tracks & frame work	252
Florence	BlueStar	Auto parts distributor	68

	Chuo Mubea Suspension Components Inc (CMSC)	Hot formed spring wire	4
	Eagle Manufacturing Co LLC	Diesel truck cylinder heads & connecting rods	236
	IT Spring Wire LLC	Steel wire for coil spring of automobile	58
	Johnson Controls Inc	Dry battery components, plastic battery containers & covers	120
	Mubea Inc	Automotive springs & spring hose clamps	463
	Ticona Polymers Inc	Plastic materials, regional headquarters, R&D	134
	ZF Sachs	Automobile suspension components & struts	400
Frankfort	AWP Industries Inc	Roll forming & metal stamping; material handling storage products: pallet rack decking; wire and solid steel containers.	113
	Certified Tool & Manufacturing	Injection molding, metal stampings & automotive components, robotic & fusion welding	131
	Elastometall Kentucky LLC	Rubber - metal bonded automotive products	26
	General Fasteners	Warehouse/distribution of automotive fasteners	3
	IDT Tools Inc	Automotive tools, dies, and metal stampings	20
	Kentucky Industrial Coatings	Powder painting, electrostatic painting	10
	Meritor Automotive Inc	Truck axles	105
	Montaplast of North America	Plastic injection molding automotive wheel covers, center caps, and intake manifolds	651
	Ohi Automotive of America	Automotive parts & metal stampings, headquarters	300
	RJ Industries LLC	Plastic injection molder parts for the auto industry.	43
	Topy Corp	Road wheels for passenger cars and light trucks.	600
	WMI Incorporated	Metal stampings, tool & die	105
Franklin	Arvinmeritor Industries	Braking systems for heavy vehicles	77
	Dana Corporation	Stainless steel piston rings	70
	Dana Corporation	Piston rings	148
	Franklin Precision Industry	Assembly of automotive throttle bodies & charcoal canisters, injection molding	460
	Garvin's	Recreational-Vehicle Facility	
	Harman/Becker Automotive Systems	Digital and analog audio automotive equipment	325
	Keystops LLC	Corporate office	46
	New Mather Metals	Stabilizer bars for the North American OEM Automobile Manufacturers	110
	Novitec Industries Inc	CNC machining facility, long-run production, volume die cast machining, 30 CNC machines, screw machines, production tube-cutting, wire edm, waterjets	105
	Petroferm Contract Services Inc	Cleaning of metal stampings, metal finishing	15

		Automotive anti-vibration rubber parts: engine mounting, strut mounting, bush, member mounting, insulator, damper, boot for CVJ	162
Fulton	Toyo Automotive Parts Dana Corporation	Silicone gaskets & seals - automotive	191
Garfield	Campbells Machine Shop Inc	CNC mill & lathe work & screw machine products, pharmaceutical products, automotive products, lawn care products, wire EDM, CNC plasma	7
Georgetown	C & D Manufacturing LLC	Tool & die: jigs, fixtures & progressive dies	14
	ECO Technology	Automotive fabric silencers (padding beneath carpet)	5
	International Crankshaft Inc	Crankshafts & steel forgings	150
	ITS	Automobile paint finishing systems; coolant filtration systems, robot installation	51
	Johnson Controls Inc	Automotive seating	259
	Johnson Controls Inc	Automotive foam seating	434
	Louisville Forge & Gear Works	Steel forgings, crankshafts, powder metal sinter forgings, connecting rods, customized parts	488
	STM Inc	Tool & die, specialty machines, jigs & fixtures; grinding, polishing, general & CNC machining, drilling, boring, cutting, honing, lathe/ mill work, fabricators, molding plastic	15
	Toyota Logistic Services	Vehicle preparation & distribution from plant to dealers	174
	Toyota Motor Manufacturing Kentucky	Automobiles-Camry sedan, Avalon sedan, engines (4 cyl & V6), axles, steering components, blocks/cylinder heads/crankshafts	7400
	Toyota Tsusho America Inc	Metals service center; steel slitting; blanking; warehousing; distribution	450
	Vuteq Corp	Car windows & sunroofs	150
	Vuteq Engineering Corp	Reusable steel material handling containers, automotive stamping dies, automated assembly line equipment, checking fixture gauges & EDM	80
	Wise Industry	Metal die blocks & special machinery tools, box spring tables (Sealy Corp.), electrical box handles (Square D), automotive stampings (Johnson Control), metal fabricating (TMMK)	2
Gilbertsville	Pinnacle Gauge & Tool LLC	Machine shop: general & CNC machining & tooling, gauges and instruments. Supplies auto and aerospace industry.	32
Glasgow	A C K Controls Inc	Automotive control cables	460
	AMAK Brake LLC	Vehicle brake systems	436
	Chuo Precision Spring Glasgow Inc	Clutch springs and valve and transmission springs	20
	Dana Corporation	Heavy duty truck axles & brakes	550
	Federal-Mogul Friction Products	Heavy duty truck brake friction blocks	229
	J L French Automotives Castings Corp	Die cast aluminum automotive parts	310

	J L French Automotives Castings Corp	Aluminum die cast automotive parts-machining facility.	300
	SKF USA Inc	Hub bearings	200
Hardinsburg	Whitworth Tool	Automotive, bedding, electronic metal stamping, rotary tablet punch press components, emergency repairs, implant and outplant	42
Harrodsburg	Hitachi Automotive Products USA	Automobile electric & electronic components	712
	Modine Climate Systems Inc	Automobile & truck air conditioning equipment	210
	Trim Masters Inc	Automotive seat covers & plastics components	457
Hawesville	Alcoa Automotive Casting Inc	Aluminum foundries, castings/forgings, auto components	136
Hazard	DJ Inc	Automotive & electrical appliance plastic parts	65
Hebron	Chicago Rawhide	Dist. auto oil seals	205
	Hahn Automation Inc	Automation systems for the automotive industry	9
	HiTech Polymers Inc	Compound custom resins & specialty thermoplastic resins	18
	ITT Koni America LLC	Auto parts distribution	23
	NACAM North America	Assemble steering columns for automobiles	160
	Toyota North American Parts Center Kentucky	Parts warehouse / distribution center / hub	350
	Wagstaff Inc	Custom aluminum molds & castings	30
	ZF Boge Elastmetall	Rubber & metal bushings	180
Henderson	Accuride Corp	Truck wheels & rims	234
	Atlantis Plastics Inc	Thermoplastics & plastic injection molding, finishing, fabricating & subcontract assembling	147
	Custom Resins Inc	Nylon & nylon products	51
	Dana Corporation	Truck axles & brake components	700
	Gibbs Die Casting Corp	Aluminum & magnesium die castings, headquarters	1000
	J-Ron Machine & Tool Inc	Plastic injection & steel molds	24
	J-Ron Machine and Tool	Machine shop: mill & lathe work, plastic injection molding, CNC & EDM machining	80
	Morris Tool & Plastics Inc	Machine shop: drilling, boring, cutting, honing, tool & die, plastic injection molding, lathe & mill work	13
	Service Tool & Die Inc	Tool & die	70
	Service Tool & Plastics	Injection molded plastics	120
	Teknor Apex Co	Thermoplastic elastomers	25
	Vincent Industrial Plastics Inc	Custom plastic injection molding, decorating and assembly, injection mold tooling, plastic product design and engineering	300
Hickman	Bermag Industries LLC	Prototype aluminum, zinc, and bronze castings; Heat-treating; machining; rapid prototyping	20
Hodgenville	Konseil USA Inc	Automotive parts, factory automation systems, and air grippers	
Hopkinsville	CoPar Inc	Industrial radiators, oil coolers	240

	CoPar Inc	Industrial aluminum radiators and oil coolers	264
	Dana Corporation	Automobile frames	600
	Douglas Autotech Corp	Automotive directional controls: steering columns & shifters	210
	Emhart Technologies	Blind rivet fasteners	175
	Freudenberg Nonwovens Ltd	Nonwoven textiles; air & particle filtration filters	275
	Grupo Antolin-Kentucky	Foam headliners for automobiles	545
	Maintainer Corporation of Iowa Inc	Manufacturers service truck bodies, lubrication truck bodies and extendable cranes	
	Melleck LLC	Bumpers and fascias	
	Meritor Suspension Systems Co	Torsion & stabilizer bars and coil springs	180
	Metokote	Electrodeposition & powder coating service	19
	Mid-Continent Spring Co	Compression, torsion & precision springs	120
	Original Exhaust Manufacturing	Automotive tail pipes & mufflers, mfg plant & headquarters	18
	Superior Graphite Co	Granular synthetic graphite & desulfurized petroleum coke	70
	Tennessee Wire Technologies	Electrical wire harnesses and control panels for the auto, HVAC and appliance industries	6
	TG Automotive Sealing Kentucky	Automotive weatherstripping, rubber molded & plastic interior auto parts.	456
	ThyssenKrupp Hopkinsville	Automotive assemblies & painting of chassis components & suspension systems	432
Independence	Benda-Lutz	Metal powder products for auto industry. Bonded metallic powder coatings for general industrial use.	38
	Magni Industries	Chemical preparations: corrosion resistant coatings	17
Ivel	R & S Godwin Truck Body Co LLC	Steel & aluminum fabricating: dump truck bodies & trailers	185
Kuttawa	Kuttawa Plastics LLC	Plastic injection molding, emblems, and nameplates	18
Lawrenceburg	Custom Tool & Manufacturing Co	Wiring harnesses, machine shop; welding	53
	YKK Snap Fasteners America, Inc	Automatic attaching machines, metal buttons, snaps, fasteners, hooks & eyes	300
Lebanon	Angell-Demmell North America Inc	Metal nameplates & plaques & aluminum trim	150
	Central Kentucky Tool & Engineering Inc	Machine shop: general, lathe, mill & CNC machining; EDM, drilling, cutting, honing, tool & die, sheet metal fabricating, stamping, welding, grinding & CAD	50
	Curtis-Maruyasu America Inc	Tube fabricating	559
	Curtis-Maruyasu America Inc	Tube fabricating	100

	Curtis-Maruyasu America Inc	Tube fabricating	100
	Hendrickson Truck Suspension Systems	Heavy truck suspensions	111
	NSU Corporation	Muffler component parts, fiberglass for headliners for various automotive companies, substrate board	100
	Shuffett Machine & Welding Inc	Machine shop: drilling, boring, MIG & arc welding, mill & lathe work, grinding, laser cutting, CNC punching, CNC mill & lathe work, CNC bending, plasma & oxy fuel cutting	2
	Summa Technology Inc	Metal fabrication: cutting, sawing, laser cutting, welding (certified), design services, specialize in returnable material handling racks & baskets	150
	TG Kentucky LLC	Rubber molded & plastic interior automobile parts	700
	Toyodabo Manufacturing Kentucky LLC (TBMK)	Automobile parts- molded headliners	17
	US Chita	Coil springs and valves	30
	Wilbert Plastic Services	Plastic Products	190
Leburn	Combs Custom Cycles	Custom motorcycles	4
Leitchfield	Leitchfield Machining Inc	Machine shop: general machining; drilling, boring, cutting, lathe & millwork	27
	Trim Masters Inc	Automotive seat covers	498
Lexington	Accurate Tool & Manufacturing Company, Inc.	Tool & die: plastic & rubber molds, medical & industrial prototype parts	8
	Accuomm U S A Inc	Carbide cutting tools	55
	ASC Incorporated	Automotive convertible tops and related assemblies	110
	Blue Grass Manufacturing Inc	Contract manufacturer, CNC Maching, metal fab., welding and electro mechanical assembly, stampings, fabricated wire, tube and pipe.	20
	Blue Star Plastics Inc	Custom plastic injection molding & assembly	135
	Bosch Rexroth Corp Pneumatics	Pneumatic, hydraulic cylinders, valves, electropneumatic control systems & actuators	264
	Central Kentucky Processing	Metal finishing, pickling, deburring, cleaning & tumbling; zinc, black oxide, electro, nickel & electroless nickel plating services	105
	Central Kentucky Processing	Metal heat treating	35
	Contract Machining & Manufacturing	General, CNC, prototype & custom machining; tooling	65
	Controls & Automation Inc	Provides industrial control systems and software for machinery, material handling systems and process control functions	4
	Crest Products Inc	Metal stampings, self locking metal fasteners & washers	131
	D S M Inc	Screw machine products	54

	GE Lighting LLC	Automotive sealed beam headlights & specialty lamps	225
	Ideal Tool & Manufacturing Co	Machine shop: parts, components, tools & dies; CNC, general & EDM machining, drilling, boring, cutting, surface grinding, mill & lathe work	25
	Imperial Tool & Manufacturing Co Inc	Custom made special machinery, molded tools, dies, jigs, plastic products & molds	9
	Kito USA	Welding equipment	25
	Molding Solutions	Custom injection molded rubber & plastic products, plastic & metal fabricating	30
	MTI Lexington	Automotive metal stampings	165
	Ni Autowindow Systems Inc	Assembly work for automotive windshields	78
	Parker Seal Co	Rubber O-rings	169
	Republic Diesel	Driveshafts; engine repair & arc welding	14
	Toyo Lex Industry Corp	Automobile industry tape & foam products	20
	Visumatic Industrial Products Inc	Automated systems;screw, drive feed mechanisms/custom belt equipment to Delco/Ford and others to use in their manufacturing	25
	Webasto Sunroofs Inc	Automotive sunroofs	450
Livermore	Livermore Brass & Silver Shop	Silver, zinc, chrome, nickel, copper plating	10
London	ABC Group Holdings Inc	Research, development, design, manufacturing and assembly of automotive parts	109
	Aisin Automotive Casting LLC	Automotive aluminum die cast components	643
	Bluegrass Spring Co LLC	Compression, extension, formed wire & flat springs	9
	Highland Diversified Services Inc	Subcontract assembly, powder coat painting, welding, metal stamping (40 ton - 800 ton)	369
Louisa	American National Rubber	Rubber gaskets & seals	100
Louisville	Acme Auto Electric Inc	Automobile starters & alternators and auto service	25
	AFL Automotive LP	In-line vehicle sequencing	50
	Alcoa Heat Exchanger Products	Aluminum heat exchanger tubing	57
	Alliance Machine Tool Co	Machine shop: machinery tool accessories, gauges & custom replacement parts	21
	Alpha Machine Tools Inc	Belt conveyors & pallet racks, production fabrication & machine building, shipping containers and steel fabrication	15
	American Dispersions Inc	Water base dispersions for rubber & plastics industries	13
	American Synthetic Rubber Company LLC	Reprocessed & synthetic rubber; liquid polymers	350
	Anglo-American Molds Inc	Plastic injection & heat resistant molds (thermoplastic & thermoset tooling for plastics industry)	5

	Anson Industries LLC	Machine shop: CNC & precision machining; custom machinery & parts; jigs & fixtures; die rebuilding & repair; metal fabricating	35
	Apollo Oil LLC	Distribution of automotive oils and chemicals.	26
	Ashland Distribution	Distribution center	28
	Asia-Link Inc	Importer of OEM custom cable assemblies	20
	ASR Services Inc	Plastic & metal automotive & appliance part assembling; pad printing	9
	ATC Distribution Group	Automobile transmission parts distribution	40
	Atlas Machine & Supply Inc	Machine shop: drilling, boring, cutting & honing; MIG & TIG welding; cylindrical & crankshaft grinding; lathe & mill work; sheet metal fabricating	165
	Barbee Co Inc	Automobile radiator service equipment	10
	Becker & Durski Manufacturing	Jockey colors, racing bridles & halters	15
	Bell Motor Service Inc	Rebuilt automotive, tractor & boat engines and custom engine rebuilding	2
	Beneke Wire Co	Aluminum rod, bar & wire for cold heading	45
	Bohn Fiberglass Industries	Fiberglass panels, scrubbers, pipes, tanks & tank linings; custom non-corosive products and equipment	10
	Borden Chemical Inc	Electronic resins; foundry resins; automotive resins	200
	C & S Machine & Manufacturing Corp	Machine shop: CNC machining, arc & gas welding, drilling, boring, cutting, honing, lathe & mill work	29
	Cardinal Aluminum Co	Custom aluminum extrusions & moldings including anodizing, powder coating and fabricating.	525
	Cardinal Manufacturing Co	Steel, bronze, brass & aluminum roll formed metal products & parts	58
	Craig Machinery & Design Inc	Automation machinery & tooling, plastic assembly equipment	21
	Cummins Cumberland Inc	Distribute Cummins diesel engines for trucks and generator sets	50
	Dakkota Integrated Systems LLC	Interior automotive products	
	Dana Corporation	Automotive drive shafts	213
	Deltech Manufacturing Inc	Tools, dies, jigs & fixtures; metal stamping & fabricating, welding, drilling, CNC machining & plastic injection molding	28
	Derby Fabricating LLC	Automotive parts— rubber goods.	60
	Derby Industries Inc	OEM Support & Logistics & Supply Chaing Mgt Services; assembly, sub-assembly, packaging, co-packing, kitting, retail & OEM distribution, corporate office	400
	Diesel Injection Service Co	Fuel injection pump repair	80
	DuPont Co	Refrigerants, Intermediates	148

	DuPont Performance Elastomers LLC	Synthetic elastomers	256
	Dynacraft	Automotive hoses & battery cables, truck parts distribution	350
	Eckart America LP	Metallic aluminum paint pigments, powders & paste	130
	ECO Environmental Filtration	Dust collector filters, blower, compressor filters, air & gas filters	15
	ERS Solutions	Help desk/hardware and software repair center, Support automotive diagnostic equipment designed for use in Ford & Lincoln-Mercury dealerships.	1
	Fabricated Extrusion Co Inc	Custom plastic profile extrusions	28
	Falls City Machine Technology	Machine shop: heat treating & custom built machinery	24
	Faurecia Exhaust Systems	Automobile exhaust systems	311
	Fold-A-Way Corp	Aluminum sand castings; aluminum & nylon fold-away bumper steps for vans & RV's	5
	Ford Motor Co	Medium & commercial light truck assembly	6000
	Ford Motor Co	Automobile assembly (Ford Explorer, Mercury Mountaineer, Ford Explorer Sport-Trac)	3500
	Gerdau AmeriSteel	Steel fabricating & rebar	30
	H S Spring	Coil & constant force springs, spring assemblies, Point of purchase display components	48
	Haas Auto Parts & Machine Co Inc	Machine shop: general machining, engine rebuilding, drilling, boring, surface & cylindrical grinding, lathe & mill work	6
	Hesco Parts Corp	Automobile engines & component parts	145
	Hi-Tech Mold & Tool Inc	Custom plastic molds; plastic injection molding, tooling, decorating, thermoforming & foam fabricating	110
	Houston-Johnson Industries	Automotives warehouse/distribution	20
	Indesco Inc	Custom automated machinery, designs custom mfg equip	13
	Interpolymer Corp	Acrylic polymers, water based coating compounds & cosmetics	17
	IQL Corp	Steel & metal fabrication: sheet, plate, structural & aluminum; MIG & TIG welding	90
	Johnson Controls	Environmental factory & building automation controls; electronic equipment	85
	Judd Brothers Machine	Machine parts for auto industry, fabrication	6
	Kroeger's Automotive Inc	Automotive machine work, boring-valve jobs, crank turning, etc.	1
	Label Specialties Inc	Flexographic printing; hot stamping; pressure sensitive & cloth labels	19
	LaCrosse Enterprises Inc	Custom metal fabricating	9
	Lear Corp	Automobile & van seats	512

	Loma Automation Technologies	Custom industrial machinery	23
	Marcus Paint Co	Powder & protective coatings & paint, liquid coatings for OEM	43
	Metro Fabrication Inc	Wiring assemblies & harnesses	20
	Millennium Forge Inc.	Steel forging & fittings for valve & automotive use, custom forging-raw.	75
	Miyama USA Inc	Refrigerator subassembly, washer subassembly, automotive parts, and forklift parts.	85
	NHK Spring Precision Components Inc	Precision springs for the automotive industry	
	Nuplex Resins	Industrial resins	90
	Nypro	Automotive & appliance plastic parts	300
	Owens Corning	Corporate office	35
	Owens Corning	Thermal acoustical & structural insulation for appliance, furniture & transportation markets	40
	Oxy Vinyls LP	PVC resin	100
	Parts Unlimited Inc	Automotive padded interior seats, door panels & headliners, headquarters	106
	Plastech Engineered Products	Plastic components	370
	Plastech Exterior Systems Inc	Manufactures, paints, and assembles injection molded plastic automotive parts	270
	Popp Machine & Tool Inc	Machine shop: arc, gas, MIG & TIG welding; general & CNC machining, drilling, boring, cutting, honing, lathe & mill work	20
	Porcelain Metals Corp	Deep drawn stampings, porcelain enameling, powder painting & assembling, parts and sub assemblies for other manufactures	16
	Power Train of Ky	Truck parts distribution	16
	Precision Tool Die & Machine	Tool & die, CNC machining, tube bending, metal stampings, turning, boring, threading, lathe & mill work	3
	Precision Tool Die & Machine	Machine shop: CNC, lathe & mill machining, screw machine parts, tube bending, metal stampings, tool & die, turning, boring, threading, power coating	190
	Prescottech Industries Inc	Fiberglass, paperboard, urethane & polystyrene fabricating, polyethylgine, rubber foil converting	36
	PSC Fabricating	Paperboard specialties, corrugated board & foam plastic fabricating, automobile foam products	100
	PSC Fabricating Corp	Automobile foam products	65
	Rohm & Haas Co	Acrylic emulsions, PVC modifiers	375
	S & S Tool & Machine Co Inc	Machine shop: precision machined parts, gauges & fixtures	50
	S & S Tool & Machine Co Inc	Machine shop: CNC machining, production parts, gauges & checking fixtures	25
	Spalding & Day Tool & Die Co	Tools, dies, fixtures, guages	34
	Sport Paint Inc	Automotive industrial paint finishing supplier	70

	Stauble Machine & Tool Co Inc	Metal stampings, tools, dies & jigs; machinery & machine tools rebuilding	90
	Superior Van Mobility	Van conversion and wheel chair accessible vans	35
	Sypris Technologies Inc	Custom forgings	310
	T & WA Inc	Tire/wheel assembly, headquarters	32
	TFC Mfg Inc	Bending of mirrors, reflective coatings	125
	Vico Louisville LLC	Steel caliper pins for the automotive industry	70
	WAKO Electronics (USA) Inc	Appliance thermostats, sensors, switches for automotive and appliances	71
	Warner Machine & Tool	Automotive tooling, material handling equipment and robotics.	12
	Whelan Machine & Tool Co	Machine shop: MIG & TIG welding, general & CNC machining, drilling, boring, cutting, honing, lathe & mill work	25
	Yamamoto F B Engineering Inc	Brake pressure plates	140
	Zeon Chemicals LP	Synthetic rubber and polymer products: nitriles & polyacrylates & corporate HQ	136
	Zeon Chemicals LP	Synthetic polymers research & development, sales, marketing	92
	Ziniz Co	Conveyors & special machinery	100
Madisonville	Ahlstrom Engine Filtration LLC	Paper filters	135
	Apollo Oil LLC	Distribution of automotive oils and chemicals.	11
	Autoliv ASP Inc	Automotive seat belts	385
	Lear Corp	Plastic automotive components and head liners	454
	Summitt Molding & Engineering	Molded plastic parts	21
	Tri-Valley Millennium Plastics Inc	Plastic injection molding and blow molding	50
Manchester	Kentucky Mountain Industries	Cold rolled, brass, CRS & stainless steel automotive stampings; plumbing fixtures & appliance parts; tool & die	22
Marion	Par 4 Assemblies Inc	Lighting assembly, automotive component assemblies	18
	Par 4 Plastics Inc	Custom injection & molded plastic products	165
Mayfield	Continental Tire North America Inc	Mixed rubber compounds, tire warehousing	220
	Pioneer Mold & Engineering Inc	Plastic injection molds	8
Maysville	Federal Mogul Corp	Automotive distribution center	264
	Green Tokai Co Ltd	Weather stripping, auto trim	318
	Mitsubishi Electric Automotive America Inc	Car radios & automotive parts	385
	Wald LLC	Conveyor system components; wire baskets, tubular handlebars, stamped fenders; automotive jack handles, lazy susan posts, spare tire carriers, infant car seat components	125

Middlesboro	Kirby Steel Products Inc	Metal truck beds & bodies, truck equipment.	3
	Yeary Auto Electric	Automobile starters, alternators & driveshafts	4
Milton	PMI Ameriform	Aluminum & stainless steel fabricating	100
Monticello	Monticello Machine Shop Inc	Machine shop: drilling, boring, cutting, honing, general machining & welding; conveyors, plate & sheet metal fabricating	13
Morehead	Guardian Automotive	Plastic exterior trim	600
	Morehead Machining Inc	Tool & die: jigs, fixtures & progressive dies	15
Morganfield	Dawson Manufacturing Co	Rubber inserts for automotive industry	70
	Heartland Powder Coating Inc	Powder coating, high temperature, ceramic, internal engine, piston	4
	Huff Technologies Inc	Custom industrial assembly: process, test, inspect equipment - engine, chassis, dynamometers, PC/PLC controlled, Data acquisition and Control	5
	Rayloc	Remanufacture starters, alternators, brakes, caliper, wiper motors	500
	Trelleborg Inc	Automotive ball joint seals, rubber bumpers, electrical connectors & miscellaneous molded rubber products	155
Morgantown	American Rubber Products Corp	Gaskets & seals	70
	Casco Products Corp	Automobile cigarette lighters	52
	Eleison Composites LLC	Plastic automotive parts	
	Morgantown Manufacturing Co	Automobile parts & metal stampings	27
	Pride Plastics of Morgantown Inc	Plastic Injection molding and assembly for medical, automotive, industrial, appliance and government - MBE, 8a & OS-9000 certified. Also, containment work.	26
Mt. Sterling	Cooper Standard Automotive	Molded & extruded rubber products, reinforced rubber hoses & automotive parts, fuel delivery systems	575
	Kyosan DENSO Manufacturing Kentucky LLC (KDMK)	Assembles automotive fuel systems and fuel pump modules	150
	Precision Resource Inc	Manufactures fine blanked precision stampings	60
	Rogers Foam Corp	Polyurethane & polyethylene foam products	65
	Summit Polymers Inc	Injection molded thermoplastic automotive products	270
Munfordville	ARC Brake LLC	Remanufacture brake calipers, automotive service brake pad kits, speed/angle sensors	45
Murray	Special Carriers Inc	Truck bodies & trailers	2
	Webasto Roof System Inc	Automotive sunroofs	
Newport	Fastemp Glass Co Inc	Glass products for automobiles and other applications	39

Nicholasville	Jackson Plastics Inc	Plastic injection molding	90
	McKechnie Vehicle Components	Plastic injection molding - automotive components, wheel trim, center caps, claddings	268
	Racota Manufacturing Inc	Metal & automotive stampings, sub-assemblies, assemblies, spotwelding, debarring, riveting, tapping	15
	Trim Masters Inc	Automotive seating	436
Owensboro	Dana Corporation	Steel pickup truck frames (Tundra and Sequoia)	340
	Daramic Inc	Automotive deepcycle & Industrial battery separators	229
	DBM Technologies Inc	Plastic blow molded automotive parts	200
	Ken-Tron Mfg Inc	Wire drawing &recision stampings for electronics, automotive, battery, and television products.	100
	Mid American Metals & Chemicals	Metal recovery, automotive computers and mass air flow sensors	5
	Omico Plastics Inc	Blow molded plastic parts	200
	Owensboro Manufacturing LLC	Metal stampings & fabricated metal products	40
	Perfect Patterns Inc	Wood, metal & plastic industrial patterns	8
	Toyotetsu Mid America LLC	Stamped and welded metal automotive parts	561
	West Irving Die Casting Co	Aluminum die castings and precision machining for appliance, automotive & tool industries	125
Paducah	H B Fuller Co	Adhesives	125
Paris	CMC/CLA	Automotive wheels	450
	Paris Machining Division	Machine steering arms & tie rods for heavy-duty trucks	72
	Prime Finish	Decorative painting; application of painted and tinted finishes for automotive interiors, electronics and telecommunications industries.	45
	Quick Tek Machining LLC	contract and production of machinery	15
	T & WA of Paris LLC	Tire & wheel assembly	70
	W B Manufacturing LLC	Steel fabricating & CNC custom machining	2
Park City	JASCO International	Automotive electronic fuse box assembly	21
	Yahagi America Molding Inc	Plastic injection molded automotive parts	18
Princeton	AFCO Manufacturing	Race car suspension parts & radiators and exhaust headers	35
	Fontaine Trailer Military Product	Steel and drop deck semi trailers	78
Richmond	AFG Industries Inc	Automotive glass	215
	Asahi Forge of America Corporation	Press forging for the automotive industry	31
	B & H Tool Works Inc	Progressive Dies, Jigs, Design and Build Special Machines/Wire EDM Work, Lathe work and Stamping.	105
	Blue Grass Plating Co LLC	Zinc, black oxide, nickel phosphate/ electroplating	75

	Diversified Tool & Development	Screw machine products & CNC machining	22
	GR Spring and Stamping Inc	Automotive stamping	49
	Kokoku Rubber Inc	Rubber syringe stoppers, automobile parts. Auto, medical pharma., business machines and electronics.	165
	National Metal Processing Inc	Commercial heat treating/laser processing and welding.	22
	Nichidai America Corporation	Forging Dies	31
	P-K Tool & Manufacturing Co	Metal stampings, production machining, fabricating & assembly	60
	Precision Tube Inc	Tube fabricating, wire forming, and CNC machining	90
	Richmond Auto Parts Technology Inc	Automotive transmission gears	220
	Richmond Molded Plastics Inc	Custom injection molded plastic parts	25
	Sherwin-Williams Automotive Finishes Corp - Manufacturing	Automotive coatings & finishes	250
	Sherwin-Williams Automotive Finishes Corp Distribution Service Center	Distribution of automotive coatings	63
	TEBCO of Kentucky Inc	Truck bodies & related equipment	55
Robards	K B Alloys Inc	Aluminum base & metal alloys, aluminum based master alloys	50
Russell Springs	Bruss North America Inc	Automotive engine & transmission sealing systems	137
	Hitachi Cable	Automotive parts	135
	Lily Creek Industries	Diesel engine parts	68
	Superior Battery Manufacturing	Automotive & commercial vehicle batteries	170
Russellville	General Products Corporation	Machines cast iron and aluminum castings to manufacture products for the automotive industry	29
	Industrial Converting Company	Automotive seat pads	9
	Sensus Precision Die Casting	Aluminum die castings	325
	Ventra Plastics	Injection molded plastic automotive trim	180
Scottsville	Federal-Mogul Friction Products	Brake shoes & lining.	156
	Sumitomo Electric Wiring Systems	Metal stamping: electric automobile components and plastic injection mold	264
Shelbyville	Barnes Distribution	Packaging facility of automotive replacement parts & distribution to automotive dealers.	75

	Bekaert Corp	Preformed steel staple wire, fine wire, flat wire, nylon-coated wire, tin-coated wire and galvanized wire.	100
	Ichikoh Manufacturing Inc	Truck & car rear & side view mirrors	350
	Industrial Powder Coatings Inc	Powder coating service for automotive appliance and general industry.	80
	Johnson Controls Inc	Automobile seat assembling	365
	Katayama American Co Inc	automotive door sashes and moldings	255
	Noble Metal Processing - Kentucky LLC	Metal blanking, stamping & laser welding	150
	ThyssenKrupp Budd	Automobile parts stamping	600
Somerset	GE Somerset Glass Plant	Pressed glassware (headlights)	220
	Toyotetsu America Inc	Structural automotive components & stampings	758
Sonora	NSU Corp	Automobile muffler componets; quietening agents	87
Springfield	AMTEC Brake LLC	Friction brake pads	220
	Midwest Stamping Co	Mig welding and glass assembly	57
	Springfield Products Inc	Automobile armrests & interior plastic parts, seat trim components, instrument panel components	280
	Toyotomi-America Co	Automotive after-market products; automotive stampings	155
Stamping Ground	Commonwealth Tool & Machine Co	Tool & die, special machines & gauges, EDM work, materials handling equipment, conveyor systems, fixtures & automated machines	43
Stanford	Brake Parts Inc	Automobile & truck disc brakes	425
	Lincoln Manufacturing USA LLC	Metal stampings	88
Taylorsville	B & B Screw Machine Specialist	Screw machine products, shafts, collars & screws, brushings, fasteners, nuts	17
Utica	B V T E	Truck bodies & wheelchair lifts	8
Vanceburg	Hollinee Manufacturing Co	Fiberglass automobile door panels, cotton ironing board pads	130
Versailles	Nisshin Automotive Tubing LLC	Stainless steel automotive tubing	11
	United L-N Glass Inc	Automobile windshield & side and back window glass aned sunroofs	380
	Y H America Inc/Div 1	Automobile air conditioning & power steering hoses, fittings & assemblies; fluid conveying products.	315
Walton	AST Sales LLC	Industrial gaskets & seals, machined parts	27
	Blue Grass Metals Co	Wire forms & metal stampings	25
	Clarion Corporation of America	Logistical Center - Distribution, design, quality, and procurement for Central and North America.	54
	Faurecia Automotive Seating	Manufacture automobile seat recliners from component parts	130
	Fuji Autotech USA LLC	Automotive seat components, steering columns, and shifter selectors	7

	Waltex NKY LLC	Specialty & automated welding machinery	25
Warsaw	ATS Light Alloyed Wheels of Kentucky US	Automotive alloy wheels	153
	Sailrex Metal Components	Electropolishing of stainless, electroless nickel, zinc, and tin plating, phosphate coating service; anodizing on aluminum; hard chrome plating, zinc plating.	17
West Paducah	Cockrell Industries Inc	Monitoring & process cntrl systems; machine shop: general machining, drilling, boring, cutting, honing, lathe & mill work, arc & gas welding	4
Wickliffe	MeadWestvaco Corp	Activated carbon	62
Wilder	W J Baker Co	Tubular metal products & spacers	22
Williamsburg	Firestone Industrial Products	Air springs	300
	RKS Manufacturing Co Inc	Machine shop: automatic screw machine products, general machining, drilling, boring, lathe & mill work	9
	Sun Manufacturing and Coatings LLC	Prep & coat automotive parts for rubber bonding	120
Wilmore	Sterling Tool & Die Inc	Tool & die; general machining & custom metal fabricating, machine tool builder (special machines)	8
Winchester	Advanced Green Components LLC	Hot forged steel bearing rings, cold forming, machining	63
	Ainak Inc	Rubber seals for automotive industry	116
	Apollo Oil LLC	Headquarters, distribution of automotive oils and chemicals and industrial oils, antifreeze, grease, filters, hydraulic oils, car care products and gear oils.	140
	Brake Parts Inc	Research & development; brake pads	35
	Johnson Controls Inc	Seat repair service center, automotive interior components	32
	Ohi America	Automotive components	277
	TI Group Automotive Systems	Tool & die	42
	Univance Inc	Automatic Transmission parts, auto & motorcycle parts, forklift transmissions and ATV differential units.	84
	Wintech Inc	Plastic injection molded automotive parts and electrical switches	450
Woodburn	Precision Strip Inc	Steel, aluminum & copper processing & slitting service	78

Migration of Plants and Suppliers Southward

Operational Plants in the U.S. 1970 vs. 2005

Americans have been in love with their automobiles for nearly 100 years. During most of that time, automobiles were produced along an east-west axis running from Detroit to Chicago. Today, that has changed. A new automotive axis has developed. It runs north-south from Indiana and Ohio, through Kentucky, northern Tennessee and now expanding further southward.

Table 8		
Re-concentration of Light Vehicle Assembly Plants		
	Car and Truck Plants Operational in	
Traditional Auto Corridor	1970	2003
	Number	Number
Illinois	2	3
Indiana	0	5
Michigan	15	17
Ohio	3	8
Wisconsin	2	2
Southward Expansion of Auto Corridor		
	Number	Number
Kentucky	2	4
Tennessee	0	2
Alabama	0	3
Georgia	2	2
South Carolina	0	2
Mississippi	0	1
Auto Corridor Total	26	49
Southern States' %	15%	29%

Sources: "Effects of Auto Plant Openings on Net Migration in the Auto Corridor", *Economic Perspectives*, Federal Reserve Bank of Chicago; 2005 Market Data Book, Automotive News.

Other Influential Factors

The UK Center for Manufacturing is a renowned center worldwide for its research, education, and technical assistance in manufacturing. The Center for Manufacturing provides engineering assistance to approximately 15,000 people in North America and Europe with its staff of professional engineers with extensive industrial experience, conducts research on manufacturing systems, and provides a wide range of educational opportunities for students and industrial professionals. The Center for Manufacturing has earned praise from organizations, such as the Society of Manufacturing Engineers, in recent years for its strong emphasis on manufacturing research and education.

Because of the Center's capabilities, Toyota Motor Manufacturing selected it to develop a working model of the Toyota production system. The Center's efforts with Toyota resulted in the Lean Manufacturing program, which is an integrated research, education, and technology transfer effort. The Lean Manufacturing program has trained and taught thousands of people from hundreds of companies throughout the world on the concepts of lean manufacturing. The Lean Manufacturing program includes courses for operating managers and first-line supervisors, customized in-plant training, the International Lean Manufacturing Conference, Lean Manufacturing Network (users group for groups practicing lean manufacturing principles), and a simulation that demonstrates the effect of lean manufacturing implementation.